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PeopleSoft Query Viewer Overview

PeopleSoft Query Viewer is an end-user reporting tool that allows users to view and run existing queries. **Use a single mouse click** when working with Query. There is no need to double click on fields or tabs.

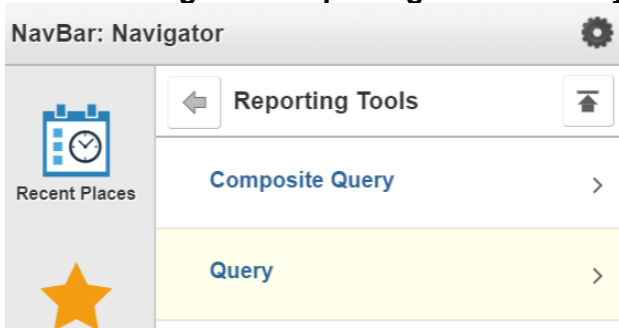
- **Do not use the back button** on the browser when navigating through SFS.
- If the system is processing, **there is not a way for you to stop the processing**. Pressing the stop button on the browser or clicking on another tab will likely cause the system to not respond. You will lose any unsaved data.
- PeopleSoft uses the terms “record” and “table” interchangeably. In this manual, the terms will mean the same thing, which is a two-dimensional arrangement of rows and columns that holds data.
- Queries can be either ‘Public’ or ‘Private’. Public queries are available for any user to review, run or alter. Private queries can only be accessed by the query owner.

Process Frequency	Used on an ad hoc basis.
Dependencies	Some knowledge of SFS records and data.
Assumptions	N/A
Responsible Parties	N/A
Alternate Scenarios	N/A

Process Detail

I. Getting Started

Navigation: Reporting Tools > Query > Query Viewer



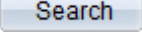
There are the three options for Query from the main menu:

- Query Manager- Allows you to create new queries and modify or run existing queries.
- Query Viewer- Allows you only to run existing queries.
- Schedule Query- Allows you to schedule an existing query to run sometime in the future.

II. Running an Existing Query

Navigation: Reporting Tools > Query > Query Viewer



1. **Clicking**  here will return the first 300 queries available to you. To access additional queries it is necessary to specify search criteria. For additional criteria, **click** on the **Advanced Search** link:

Query Viewer


Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name

Description

Uses Record Name

Uses Field Name

Access Group Name 

Folder Name

*Query Type =

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

2. **Enter search** information that will limit the results to a manageable number. This search is useful if you do not know the query name but know a record the query uses.
3. For example, using the query **UW_88_NVS_LIST_OF_ACCOUNTS**. You can enter part or the entire name to get a list of queries. The more data entered, the more refined the results

Query Viewer


Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name

Description

Uses Record Name

Uses Field Name

Access Group Name 

Folder Name

*Query Type =



Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

Search Results

*Folder View

Query		Personalize Find View All   First 1-10 of 10 Last							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UW_88_NVS_LIST_OF_ACCOUNTS		Public	NVISION	HTML	Excel	XML	Schedule	Lookup References	Favorite

4. There are five Run options for Query Viewer:
 - a. *Run to HTML* – Run this report to a HTML format.
 - b. *Run to Excel* – Run this report to a Microsoft Excel format.
 - c. *Run to XML* – Run this report to an XML format.
 - d. *Schedule* – Run this report at some time in the future. The results will show up in the Report Manager and can also be e-mailed to you or other users. ([See Section III](#))
 - e. *Add to Favorites* – Add this query to your list of favorite queries. The query will then show up on the bottom of the query search pages to find easily. Below is an example:

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.


*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query				Personalize	Find	View All	First	1-10 of 10	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UW_88_NVS_LIST_OF_ACCOUNTS		Public	NVISION	HTML	Excel	XML	Schedule	Lookup References	Favorite

- This report will show up on the query search pages under the *My Favorite Queries* section until it is removed from the list. To remove a query, **click**  under the *Remove* column, or **press** to remove all favorite queries from the list.

III. Scheduling a Query

Navigation: Reporting Tools > Query > Query Viewer

When scheduling a query, the query will run through *Process Scheduler*. You define the time and day to run the query, along with distribution options.

- To schedule a query from the *Query Viewer*, **click** on the *Schedule* hyperlink.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query				Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UW_88_NVS_LIST_OF_ACCOUNTS		Public	NVISION	HTML	Excel	XML	Schedule	Lookup References	Favorite

- A run control is needed to schedule a query. A run control is a unique name given to a group of settings or configuration for output for a specific report.

Scheduled Query

Private Query

Query Name

Run Control ID

3. Either **select** an existing run control or **create** a new run control for the query. PeopleSoft defaults to **Add a New Value** if no Run Controls exist.

4. To search for an existing Run Control go to **Find Existing Value** and click search.

Once you have created a Run Control ID for a specific query, the *Scheduled Query* screen will default to

5. To add a new value, Click **Add a New Value**

6. **Type** in a *Run Control ID*

7. **Click**

8. **Enter** a *Description* for the query

9. **Click**

10. **Enter** a value for any prompts in the query.

11. On the Process Scheduler Request page, you can set up the output for your query. You can leave the **Server Name** field blank and it will default to the proper server.

Otherwise, Run scheduled queries on the 'PSUNIX' server. **Choose** 'PSUNIX' from the *Server Name* drop down menu.

12. **Select** the time that PeopleSoft should run the query, if different than the default time.

13. You can also **set** a recurrence, if you would like a report run more than once on a schedule.

Process Scheduler Request Help

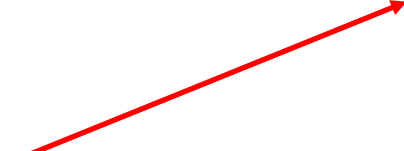
User ID 00913865 Run Control ID RUN_SCHEDULED_QUERY

Server Name Run Date 12/10/2018

Recurrence Run Time 4:29:47PM

Time Zone

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution



14. **Select** a value from the output **Type** dropdown menu....you can also **select** an output format, using the values in the **Format** dropdown menu.
15. When using the 'Email' option (value under the *Type* dropdown menu), **click** on the *Distribution* link to set the e-mail options. You will see the Distribution Detail screen.
16. Under the Email Only section, **add** an e-mail subject, message text and email address(es) to the Email Address List box. The e-mail will send an attachment/link to the query results in the Report Manager.

Distribution Detail x

[Help](#)

Process Name PSQUERY

Process Type Application Engine

Folder Name

Retention Days

Email Only




Email Subject Email With Log: Email Web Report:

Message Text

Email Address List

Distribute To

*ID Type	*Distribution ID
User <input type="text"/>	00913865

17. The default distribution in the **Distribute To** section is only to the user that runs the query. If additional users need to view the query in the Report Manager, **add** them to the Distribute To section by **clicking** the . Any users (or roles) selected here will be able to view the query in the Report Manager. **Selecting** a role will allow anyone with that role to view the query results. **NOTE:** You cannot add or lookup a user without first choosing a value from the *ID Type* dropdown menu.
18. **Click** . You will be taken back to the *Process Scheduler Request* screen.
19. **Click** 
20. To **view** your scheduled report, **navigate** to the Report Manager. You should see a link to the **Report Manager** on the Schedule Query screen. If you do not have a link, you can **navigate** to the Report Manager as follows:

Reporting Tools > Report Manager

Schedule Query

Run Control ID RUN_SCHEDULED_QUERY

[Report Manager](#)

[Process Monitor](#)

Query Name

*Description

21. Your report can be found on the **Administration** tab under the **Details** link:

List Explorer **Administration** Archives

View Reports For

Folder Instance to

Name Created On Last 1 Days

Reports						
Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance	
1 Run Query	RUN QUERY	General	12/10/18 4:28PM	8093360	10243105	

22. To **schedule** a query from the Main Menu, **navigate** as follows:

Reporting Tools > Query > Schedule Query

NavBar: Navigator

← Query ↑

[Query Manager](#)

[Query Viewer](#)

[Schedule Query](#)

23. Follow steps 2- 19 as outlined above.

Scheduled Query

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Search by: Run Control ID ▼ begins with RUN_SCHEDULED_QUE

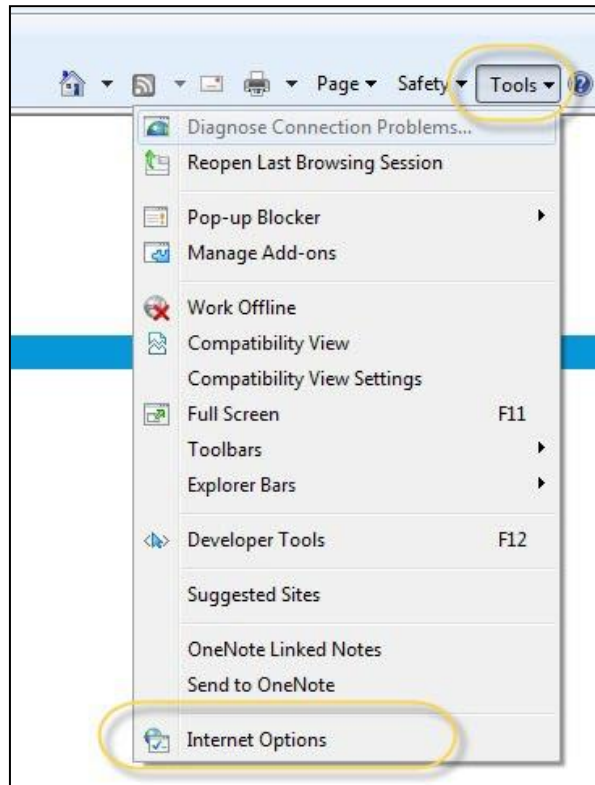
Case Sensitive

IV. Internet Explorer Settings for Query Download to Excel

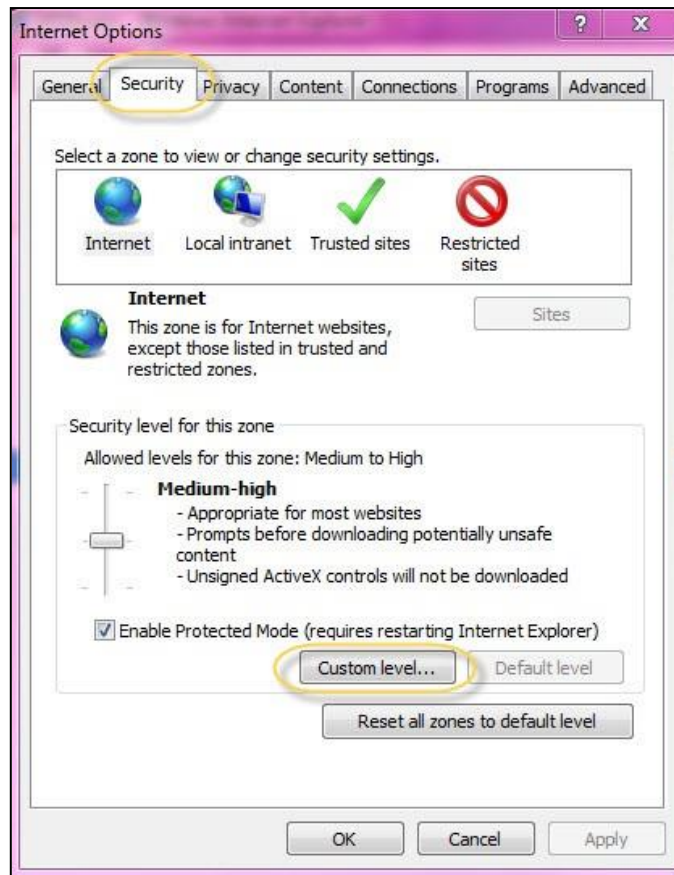
Depending on the settings on your computer, when you run a query to Excel, it may or may not open in the Internet Explorer browser window. If Excel does open in the browser window, Excel functionality is not available. This setting is defined in Internet Explorer.

To adjust the settings:

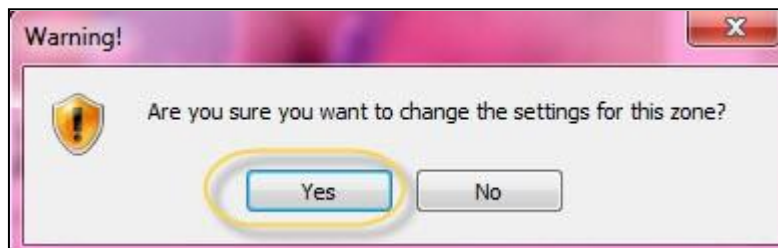
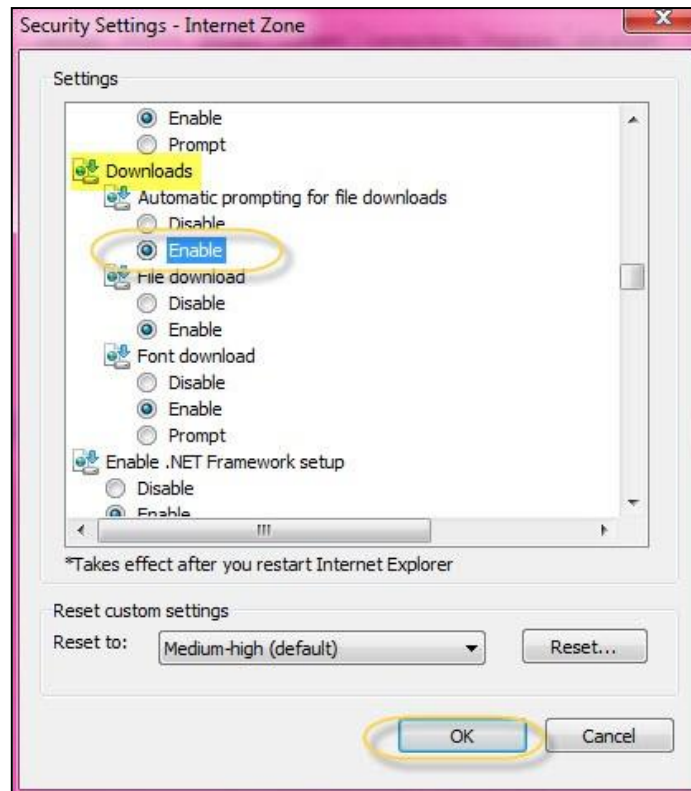
1. **Open** an Internet Explorer Window.
2. **Choose** "Tools" from the menu in the upper right hand corner.

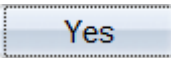
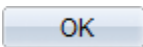


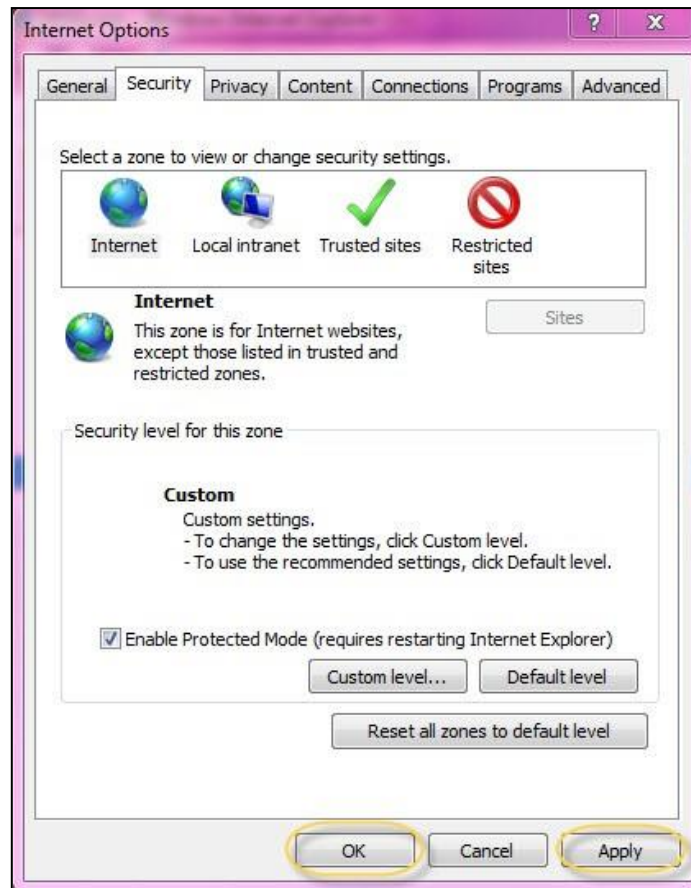
3. **Click** Internet Options.
4. In the Internet Options screen, **click** .
5. **Click** .




6. **Scroll** down to the “Downloads” heading.
7. Under “Automatic prompting for file downloads”, **choose** the “Enable” radio button.



8. Click 
9. Click 



10. Click 

11. Click  .

12. Excel will now open in a new window when opened.

Revision History

Author	Version	Date	Description of Change
Andrea Vredberg	1.0	6/24/2013	Initial Draft from 8.9 version
Stacy VanWormer	1.1	07/03/2013	Revision
Susan Kincanon	1.2	07/23/2013	Review, edit, format
Scott Larson	1.2	07/23/2013	Review and approve
Susan Kincanon	1.2	07/23/2013	Publish to website
Mike Niebanck	3.0	12/10/18	Convert to v9.2